

DEPUTY PUBLIC ADMINISTRATOR - GUARDIAN I
DEPUTY PUBLIC ADMINISTRATOR - GUARDIAN II

Class No. 005601
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DEFINITION:

To perform investigations related to estates of deceased persons and/or conservatees; to administer estates of decedents and conservatees referred or appointed to the Public Administrator/Guardian by the courts or as required by law; and to perform related work.

DISTINGUISHING CHARACTERISTICS:

Positions in these classes are located only in the Health and Human Services Agency, Public Administrator's Office. Deputy Public Administrator-Guardians are case managers responsible for the investigation of estates, the assessment of needs, and the provision of financial, personal or administrative services to conservatees or the estates of deceased persons. This class series differs from the Social Worker series in that the latter performs casework involving the assessment of social service needs and the provision of referrals and services. Social Workers do not investigate and administer the estates of conservatees. Deputy Public Administrator - Guardians are further distinguished from social work classes by the requirement of California State approved case management training under Title XIX of the Social Security Act.

Deputy Public Administrator-Guardian I:

This is the entry-level class in the Deputy Public Administrator-Guardian series. Under immediate supervision, a Deputy Public Administrator-Guardian I performs routine investigations of estates of deceased persons and routine case management (financial and personal) duties for conservatees.

Deputy Public Administrator-Guardian II:

This is the journey level class in the Deputy Public Administrator-Guardian series. Under general supervision, a Deputy Public Administrator-Guardian performs the full range of office and field investigations of estates of deceased persons and the full range of case management (financial and personal) for conservatees. This class differs from the next higher level, Supervising Deputy Public Administrator, in that the latter is the supervising level in this series.

EXAMPLES OF DUTIES:

Acts as conservatorship investigator/case manager; makes financial and personal decisions for conservatees; performs investigations to determine if estate administration is warranted; performs a significant amount of field investigation work at nursing homes, the homes of conservatee relatives, financial institutions, legal offices and courts to gather, verify and update information; makes on-going decisions on assigned cases; conducts searches for personal property and researches records, reports, and other information sources; conducts all financial activities of an estate including withdrawing bank accounts, redeeming securities, arranging payments of living and medical expenses, contracting for services, and applying for estate benefits; investigates eligibility and authorizes payment for disposition in accordance with the Indigent Burial Program; reviews and determines the validity of claims against the estate; protects the estates of conservatees from exploitation or loss by locating and taking control of all assets; recovers and secures estate assets and personal property; makes decisions regarding sale or distribution of estate assets; prepares and submits inventories of assets; reviews estates to determine those assets available for funeral and last illness expenses; determines ownership of real property; considers tax implications regarding estate administration; prepares documents for annual tax preparation; maintains contact and advises beneficiaries or

relatives of estate throughout the administration process; works with various county departments to conduct estate matters; maintains accurate files and records in a timely manner; prepares legal documents within established time limits; recommends alternatives to public conservatorship, which may include persuading relatives to assume conservatorship responsibility; arranges for placement of conservatees in the most appropriate type of residence or care facility and arranges for necessary medical and/or mental health treatment; develops case plans and monitors their implementation; makes periodic visits to evaluate and monitor delivery and quality of care given by treatment providers; authorizes personal needs allowance and special purchases; arranges for transportation as needed for the appearance of conservatees at court proceedings and physical and mental health appointments; recommends authorized medical treatment or actions by doctors or other medical professionals; confers with other departments, the police, and other agencies regarding special problems encountered and furnishes information as required; assists attorneys in pretrial preparation and during probate trials and conservatorship trials; may assist attorneys on behalf of conservatees in all criminal and civil hearings outside of conservatorship.

MINIMUM QUALIFICATIONS:

Knowledge Level: T = Thorough; G = General; -- = Not Applicable

Classification Level: I = Deputy Public Administrator - Guardian I
II = Deputy Public Administrator - Guardian II

Knowledge of:

<u>I</u>	<u>II</u>	
G	T	Laws, regulations and codes relating to the Public Administrator-Guardian function.
G	T	Procedures of Probate Court used in administering decedent and conservatorship estates.
G	T	Legal terminology used in conducting decedent and conservatorship cases.
G	T	Documents used in estate management (i.e. tax returns, stocks, bonds, bank deposits) and in real property transactions.
G	T	Concepts of wills, insurance policies, deeds, contracts and other applicable legal documents.
G	T	Public and private community resources for meeting the personal needs of conservatees.
G	T	Estate and financial investigative methods and techniques.
G	T	Case management methods and techniques.
G	T	Principles of interviewing for the purpose of acquiring factual and diagnostic information.
G	T	Methods of identifying and assessing social needs.
G	T	Public relations, principles, and practices.

Skills and Abilities to:

The following apply to both classes:

- Interview effectively to collect sensitive information.
- Administer the estates of conservatees or decedents and manage a conservatorship caseload.
- Conduct financial investigations by collecting and verifying information, and preparing reports.
- Read, understand, and interpret documents used in estate management (i.e. contracts, bank records, promissory notes) and in real property transactions (deeds, payment records, rental receipts).
- Read, understand, interpret, and apply laws and regulations related to estate administration.
- Make decisions relating to clients' financial affairs and conduct financial transactions.
- Made decisions relating to clients' legal, social, medical, and psychiatric treatment and services.
- Communicate effectively and tactfully with persons under emotional stress or mentally disabled, hostile, or uncooperative clients and family members.
- Provide information for preparing legal documents.
- Maintain records and reports.
- Perform basic mathematical computations.
- Input and retrieve data and information stored in a computerized record system.

EDUCATION/EXPERIENCE:

Education, training or experience, which clearly demonstrate possession of the knowledge, skills and abilities stated above. Examples of qualifying education/experience are:

Deputy Public Administrator - Guardian I:

1. A bachelor's degree from an accredited college or university with major course work in gerontology, social sciences, social work, sociology, psychology, business administration, accounting, public administration, or a closely related field; OR,
2. An associate's degree from an accredited college or university, AND, two (2) years of experience performing case management duties in a health and/or human services field; OR,
3. Four (4) years of experience performing case management duties in a health and/or human services field.

Deputy Public Administrator - Guardian II:

1. One (1) year of experience as a Deputy Public Administrator - Guardian I in the County of San Diego; OR,
2. A bachelor's degree from an accredited college or university with major course work in gerontology, social sciences, social work, sociology, psychology, business administration, accounting, public administration, or a closely related field, AND, one (1) year of experience in a position equivalent to a Deputy Public Administrator - Guardian I in the County of San Diego; OR,
2. An associate's degree from an accredited college or university, AND, three (3) years of experience performing case management duties in a health or human services field; OR,
4. Five (5) years of experience performing case management duties in a health or human services field.

Education and/or experience may be substituted on a year-for-year basis.

SPECIAL NOTES, LICENSES, OR REQUIREMENTS:**Note:**

Employees appointed to these classes must successfully complete agency-approved case management training prior to passing probation. (Such training is required by State of California Plan under Title XIX of the Social Security Act).

License:

A valid California Class C driver's license is required at time of appointment or the ability to arrange transportation for field travel. Employees in this class may be required to use their own personal vehicle.

Background Investigation:

Prior to appointment, candidates will be subject to a background investigation. Convictions, depending on the type and number, may be disqualifying.